

## Experienced Employed Financial Planner

Reporting to Head of Financial Planning

**Location:** Edinburgh

**Purpose:** Prydis is a multi-discipline professional practice, affording you the opportunity to work alongside other professionals to provide clients with integrated solutions to meet their needs.

As a financial planner you will deliver high quality, independent and truly personalised financial planning, in line with Prydis Wealth's Corporate Chartered status. The role has arisen due to the rapid organic growth of the business.

As part of a wider Group, financial planners have the backing of a team of professionals in other disciplines, such as accountancy and legal services.

### Responsibilities:

Servicing a number of clients who are predominantly High Net Worth or Sophisticated investors. This includes putting together a detailed financial plan followed by implementation and ongoing review.

Our team of Financial Planners service a high quality client base and are expected to generate further new business as a natural extension of the high quality advice they provide. You will be expected to maintain frequent client contact to fulfill our service proposition.

You will maintain client records in our back office system to ensure they are current and meet compliance procedures.

Supported by a team of paraplanners, you will be responsible for ensuring suitability is demonstrated for all advice you provide, backed-up by research and reviewed regularly so that it remains aligned with clients' changing circumstances, needs and priorities.

Financial Planners are expected to make referrals where appropriate to other areas of the Prydis Group to assist clients with their wider needs.

Your performance will be gauged on a variety of metrics to ensure the highest standard of behaviours, consistent with our values.



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[mail@prydis.com](mailto:mail@prydis.com)

## Relevant skills and knowledge:

Candidates will be able to demonstrate an extensive record in an independent financial planning environment. A candidate with experience of a broad range of corporate and personal financial planning is desirable.

You must already have gained (preferred), or be working towards, a Level 6 qualification.

The successful candidate will hold a current Statement of Professional Standing and must meet the requirements at all times to maintain this.

You will possess excellent prioritisation and time management skills, to ensure targets, timelines and client expectations are met.

You will build knowledge and understanding of the firm's compliance procedures including record keeping requirements, to ensure the firm's responsibilities for preventing financial crime, securing client data, demonstrating suitability and abiding by FCA rules are met.

You must be competent in using the MS Office suite of products, so you are able to be self-sufficient in performing tasks such as producing letters and reports, performing spreadsheet calculations and preparing presentations.

## Rewards:

We offer a competitive remuneration package, including basic salary, bonuses, a generous pension scheme and death-in-service benefits. Some benefits may be subject to the successful completion of a probationary period.

Prydis operate a share ownership scheme for qualifying staff and conditional on you meeting objectives and expectations.

You will be fully supported in your training and development needs, including funding of approved exams and accreditations.

## How to apply:

If you believe you have what it takes to become a successful member of our team, please email your CV and a covering letter to [jamespriday@prydis.com](mailto:jamespriday@prydis.com). Please specify the role for which you are applying and ensure you include your full contact details, so we can get in touch with you.

Prydis Group are an Equal Opportunities Employer.



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